

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Currently, students need to physically visit each Head of the Department (HOD) for approvals (such as permission for leave, events, or projects) and for raising queries. This results in:

- Delays due to faculty availability.
- Lack of a transparent system to track approvals.
- Administrative burden for both students and departments.

Proposed Requirement:

A centralized **Salesforce-based Student Permission & Query Management System** where:

- Students can digitally submit permission requests and queries.
- HODs can approve/reject requests within Salesforce.
- Notifications are automatically sent to students.
- Admins can monitor departmental performance and resolve escalations.

2. Stakeholder Analysis

- **Students:** Submit and track their requests/queries.
- **HODs/Faculty:** Review, approve/reject requests, respond to queries.
- **Admin/University Management:** Monitor performance, generate reports, ensure compliance.

3. Business Process Mapping

Current Process (Manual):

1. Student writes a physical application or email to HOD.
2. Student waits for manual approval/rejection.
3. Updates are inconsistent and delays occur.

Proposed Process (Salesforce):

1. Student raises a request or query through Salesforce.
2. System auto-routes it to the respective HOD.

3. HOD takes action → Approve or Reject.
4. Student receives automatic email/notification.
5. Admin monitors through dashboards and reports.

4. Industry-specific Use Case Analysis

Educational institutions globally are shifting towards **digital campus solutions** using CRM platforms like Salesforce to:

- Improve **student experience**.
- Automate **administrative workflows**.
- Provide **data-driven insights** to management.

This project aligns with the **Education CRM Use Case** by reducing manual intervention and improving efficiency in student–faculty interactions.

5. AppExchange Exploration

Salesforce **AppExchange** provides education-focused apps like:

- **Salesforce Education Cloud** – for student lifecycle management.
- **Approval Management Apps** – pre-built approval workflows.
- **Chatbot/FAQ Apps** – to enhance query resolution.

While our project is a **custom solution**, it can later be extended by integrating with these marketplace applications.

8. Conclusion

The manual process of student permissions and departmental queries creates inefficiencies and delays. By using Salesforce, we can **digitize approvals, automate notifications, and provide dashboards for monitoring**. This ensures transparency, faster turnaround times, and improved student experience.